# Workspace User Guide

Child Care State Capacity Building Center and
National Center on Early Childhood Quality Assurance

Early Childhood National Centers

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# Introduction

The Workspace is a web-based tool that promotes online collaboration for the Office of Child Care (OCC) projects. It is available to both ICF and non-ICF partners and is located on the Child Care Technical Assistance website at https://childcareta.acf.hhs.gov/user.

## Purpose

This Workspace provides customized features, a comprehensive search function, and access for non-ICF staff. It allows users to do the following:

- Post and store resources while maintaining version control;
- Maintain consistent organization of all center materials;
- Post and store center resources and protocols in one place;
- Reduce email traffic through the use of features such as a discussion board and announcements section; and
- Collaborate more easily on specific initiatives and OCC priorities

## Workspace Terminology

- Administrator: The person(s) designated to manage and monitor the Workspace (including center resources).
- Center resources: The central hub where general project-related documents reside.
- Moderator: The person(s) designated to manage and monitor a Workgroup.
- Workgroup: A location for a designated group of individuals to share and collaborate on projects, tasks, and documents.
- Workspace user: Anyone who has access to the Workspace.
- Workspace: An online system used to store and share resources across projects. Housed in the same location as the current Content Management System (CMS).

## Workspace Updates

The Workspace will be continuously reviewed and updated to ensure that it provides staff will all the features they need to collaborate effectively.

- Workspace administrators and moderators will work to make recommendations for enhancements to the Workspace.
- Workspace administrators will take this information back to the developers.

## Getting Help

The following provides guidance on who to contact for assistance with the Workspace based on your need.

- Contact a Workspace administrator if you have questions about the following:

- Idea for a workgroup;
- Access issue; and
- Functionality issues such as:
    - Unable to check out or in a document
    - Resources aren't uploading

- Contact a Workgroup moderator or Workspace administrator if you have questions about the following:
    - Idea for a new feature;
    - Suggestion for an improvement;
    - Problem using the site; and
    - Need for a new folder/subfolder
        - If you are working within a Workgroup, report it to your workgroup moderator
        - If you are working in Center Resources, report it to your Workspace administrator

# User Roles

## Workspace Administrators

- Tamisa Brooks (Child Care State Capacity Building Center [SCBC])
- Sheri Fischer and Chandra Curtis (National Center on Early Childhood Quality Assurance [ECQA Center])
- Michelle Sanchez (SCBC and ECQA Center)

### Role of the Administrators

- Manage center resources.
- Create folders and subfolders, as needed.
    - Note that Workspace users cannot create Workspace folders nor subfolders unless they are administrators or moderators. Users can only upload documents to the workgroups and centers to which they belong.
- Ensure documents are organized and named appropriately.
- Manage the creation of workgroups and assign workgroup moderators.
- Create and manage center announcements.
- Edit the Workspace title and center abstract.
- Aggregate, review, and report feedback from workgroup moderators.
- Communicate directly and coordinate with the technology team on revisions to the Workspace, and alert to the team new Workspace users who need access to the Workspace.

- Only the administrators will collaborate directly with the technology team. This will happen regularly as the Workspace continues to develop.

- Participate in pilots of new features.
- Work with the technology team to resolve issues.

# Workgroup Moderators

There will be one or more moderators identified for each workgroup. The assigned moderators can be found on the right hand side of the Workgroup interface.

## Role of the Moderators

- Determine the access level of workgroup (open or by invitation only).
  - Manage the addition and deletion of workgroup members, including partners from other centers.
- Manage workgroup resources:
  - Create folders and subfolders as needed;
  - Ensure documents are organized and named appropriately; and
  - Provide general oversight and quality assurance for the Workgroup space.
- Edit the workgroup title and welcome language.
- Moderate and control any communication in the discussion forum.
- Aggregate feedback from workgroup members about the functionality of the workgroup and Workspace in general and share it with workspace administrators.
- Participate as a member of the workgroup (see the "Workspace Users" section).
- Serve as members and/or moderators of multiple workgroups.

## Workgroups and Assigned Moderators

### SCBC Workgroups

- CCDF Fundamentals: Julie Ingersoll and Barbara Wall
- Emergency Preparedness: Gail Kelso
- Infant/Toddler Specialists Network: Katie Monahan and Gina Morimoto
- Information Services: Tracy Myers
- Intensive Capacity Building Network (ICBN): Harriet Dichter, Sangree Froelicher, Carrie Kocot, Kim Means, and Desiree Reddick-Head
- OCC Project Resources Workgroup: Michelle Sanchez
- SCBC Leadership Team: Michelle Sanchez
- State Systems Specialist Network (SSSN): Terrie Hare and Pattie Ryan

- Technical Assistance Tracker Workgroup: Terrie Hare, Rose Ribeiro, Pattie Ryan, and Michelle Sanchez

#### ECQA Center Workgroups

- Equity Workgroup: Laura Johns
- Family Childcare Peer Learning Group: Michele Adams
- Infant/Toddler Peer Learning Group: Char Goodreau and Laura Johns
- Licensing Best Practices Pilot: Nina Johnson
- Licensing Resource Projects: Sheri Fischer
- Quality Resource Projects: Sheri Fischer
- Racial Equity Webinars and Peer Learning Group: Nina Johnson and Sheri Fischer
- Resource Development: Sheri Fischer

### Workspace Users

Workspace users are members of the two Centers and invited collaborating partners.

# Workspace Content

## Center Resources

Center Resources is the central hub where general project-related documents reside.

- Is accessible to all Workspace users;
- Consists of documents that are applicable to and accessible by all staff;
- Organized by folder and subfolder identified by the Workspace administrator; and
- Includes documents that are titled according to a specific naming convention.

## Workgroups

A location for a designated group of individuals to share and collaborate on projects, tasks, and documents.

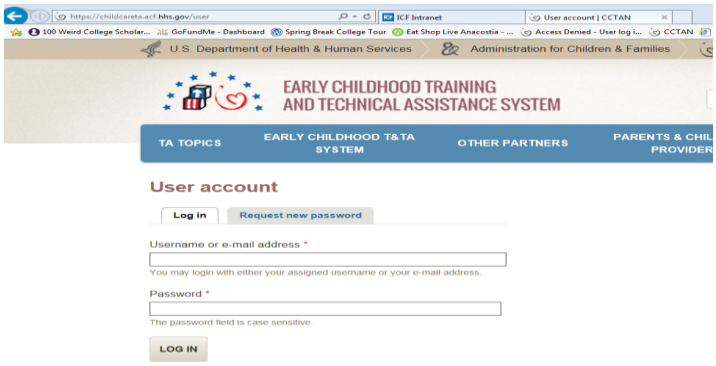
- Is accessible to select Workspace users identified by the workgroup moderator;
- Consists of documents that are related to a specific task (they may be working documents). Only a limited number of staff need access to these documents.
- Organized by the folders and subfolders identified by the workgroup moderator.
- Includes documents that are titled according to a specific naming convention.
- Will include additional features (discussion boards, a calendar, the picture library, and others as identified).

# Using the Workspace

Below you will find guidance on using the Workspace.

## Logging Into the Workspace

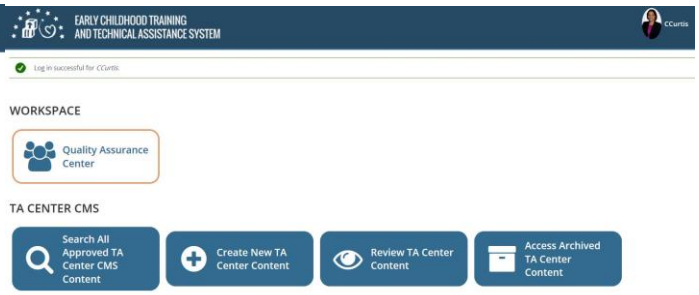
Go to the following URL to log in and to change your Workspace password: https://childcareta.acf.hhs.gov/user.




Enter the username and password and select **LOG IN**.

## How Your Landing Page Will Look

The landing page displays both Workspace and technical assistance center CMS options. The icons displayed under each of these sections are dependent on the user's role and the user's access level. After the user has selected the center Workspace, she will be directed to that center's landing page, which will display a summarized description of the center.

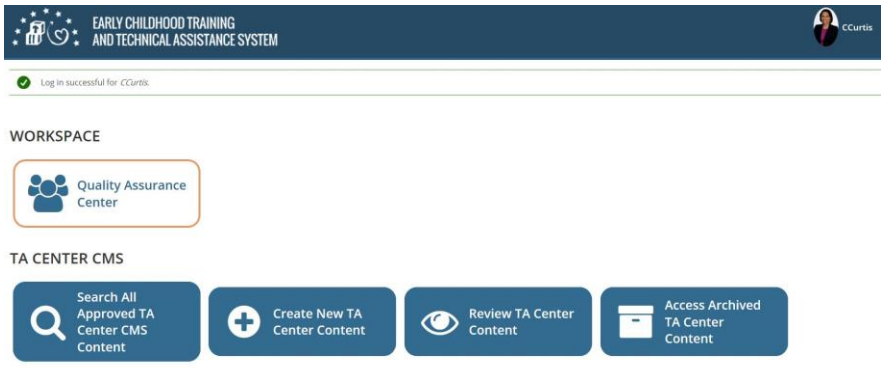


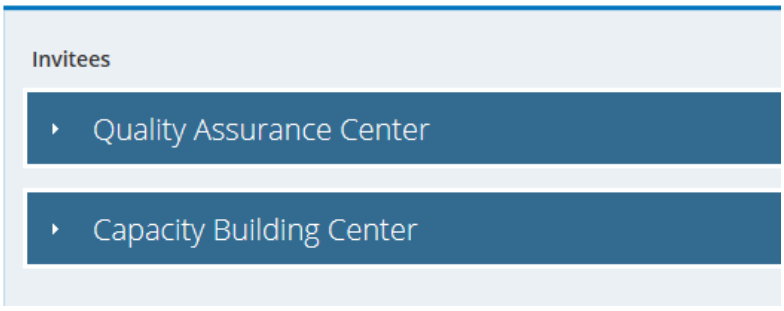

Or

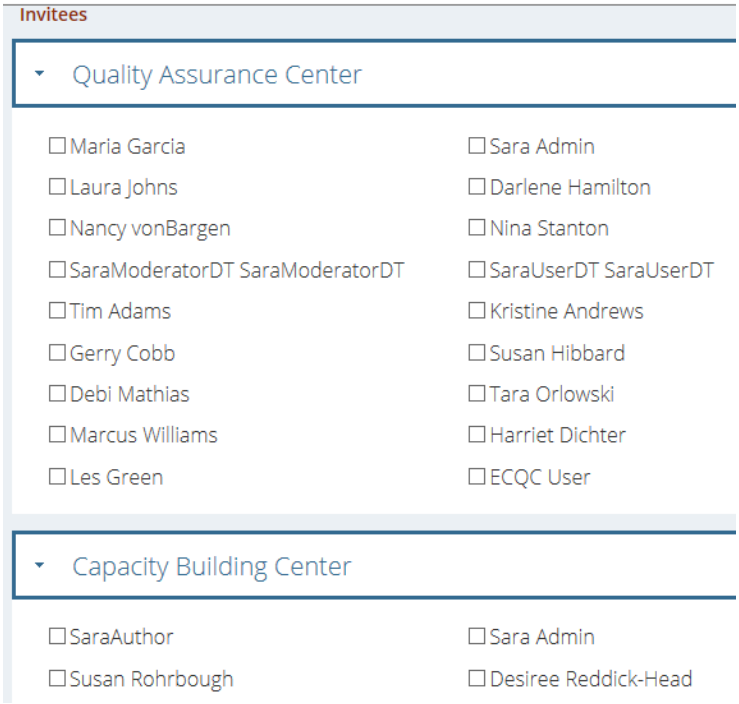
# Inviting Workgroup Members

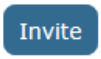
Only Workspace administrators and workgroup moderators can invite members to a workgroup. To invite a new member, follow these steps:

- Navigate to the Workgroup you want to set access for;
- Select the "**Workgroup Members**" icon;
- On the upper right, select "**Invite New Members;**"
- Select the center for which you want to invite members;
- Select the check box next to any individual(s) you want to invite; and
- Select "**Invite**."

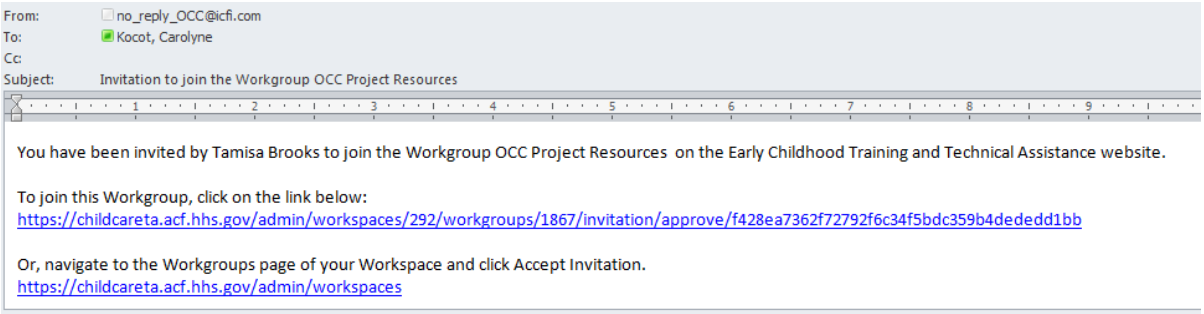


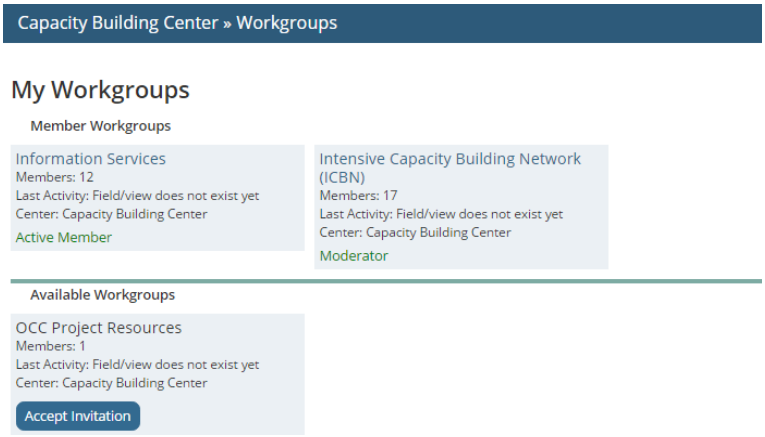






Once you have invited members to your workgroup, they will receive an email inviting them to join the workgroup (see sample below). If a user does not receive the email, she can select the workgroup icon from within the Workspace and accept the invitation (see screenshot below).

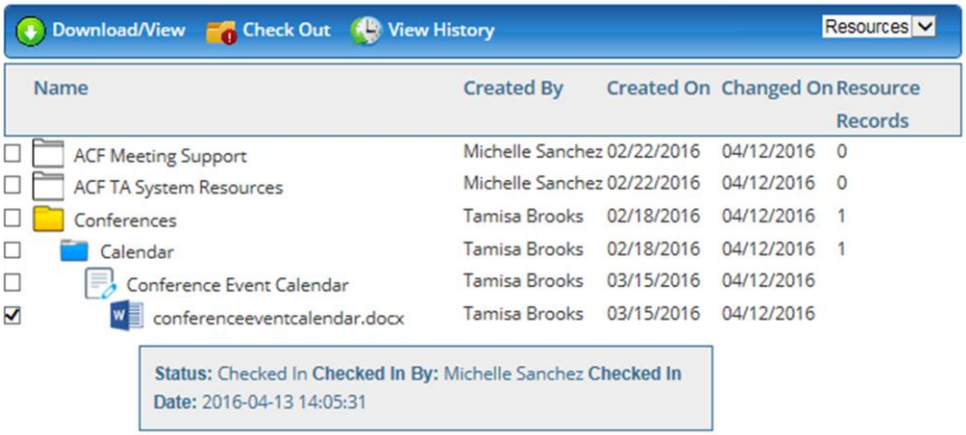





## Folder Structure in the Workspace

In the example illustrated, Conferences is the Folder; Calendar is the Subfolder; Conference Event Calendar is the Resource Record; and Conferenceeventcalendar.docx is the Resource.

- There is a consistent accordion folder structure that consists of:
  - Folder
    - Subfolder
      - Resource Record
        - Resource




- White folders indicate no resources currently exist within that folder.
- Yellow folders indicate that resources currently exist within that folder.
- Subfolders are blue.
- To expand the accordion view, click on the folder, subfolder, or resource record.
- To view the resource, select the check box to the left of the document (see the screenshot above).

- To make changes at any level, select the check box to the left. The menu bar at the top offers different options depending on your user access and the accordion level selected.

## Creating Folders and Subfolders

Only moderators can create folders and subfolders within a workgroup.

### Folders

- Select the "**Workgroup Resources**" or "**Center Resources**" button.
- Select "**New Folder**" on the menu bar (if you do not see this option, you do not have the permission required to add a folder).
- Enter folder name and select "**Open**" or "**Invitation**." "Open" means anyone in the workgroup can view content. The "Invitation" option means only those you select can view content.
- Select "**Save**."

### Subfolders

- Navigate to the folder where you want to create a subfolder.
- Select the check box to the left of the folder name.
- Select "**New Subfolder**" on the menu bar.
- Enter the subfolder name and select "**Open**" or "**Selected Users**." "Open" means anyone in the workgroup can view the content. The "Invitation" option means only those you select can view content.
- Select "**Save**."

## Uploading Resources

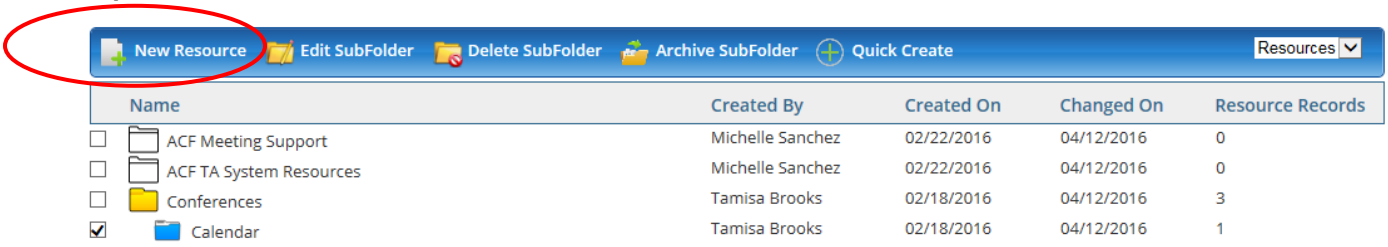
Uploading resources can be accomplished through several methods, as described below.

### Method 1: Create New Resource

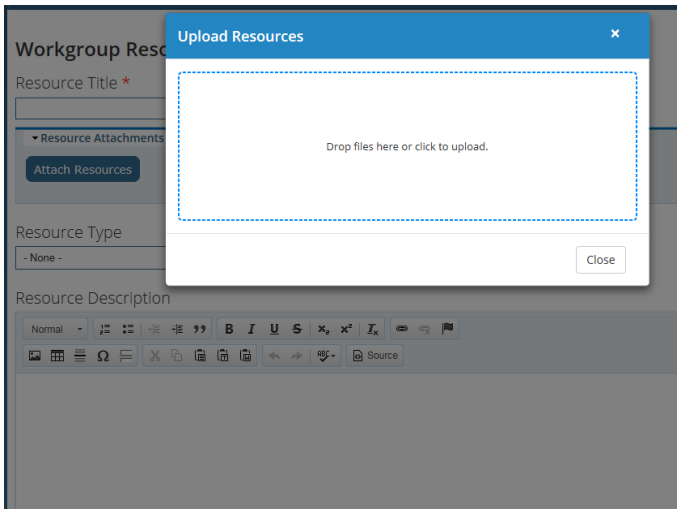
- From the workgroup or center resources page, locate the folder and subfolder where you want to upload a resource. Select the check box next to the subfolder name. On the menu bar, select "**New Resource**."
- Add a title in the "Resource Title" field (see the "Tips for Creating a Resource Title" section).
- Select "**Attach Resources**." Click inside the upload box to browse for the file or drag and drop the file into the upload box.
- Select "**Upload**." Once the check mark appears over the file, select "**Close**."
- Identify the appropriate "Resource Type" that best describes the document or do not select a resource type.
- In the "Resource Description" field, provide a brief summary of the document that will identify what it is or its intended purpose.

- In the “Related URL” field, provide a title and the URL to any resource that relates to the document. For example, if the document you are uploading is part two of a series, you can add a URL to part one.
- In the “Publication Date” field, add the date that appears in the document’s header or footer. If no date is listed, use the last edited date.
- In the “Topic/Subtopic” field, select any relevant topic and subtopic addressed by this resource. If none, leave this field blank.
- For the “Includes State Examples” field, if the document includes examples of State or Territory activities, select “Yes.” Note that RPM approval is required. (This field is for future use on the Workspace and relates primarily to resources that will be posted on the CCTA website.)
- When all information has been entered, select “**Create Resource**.”

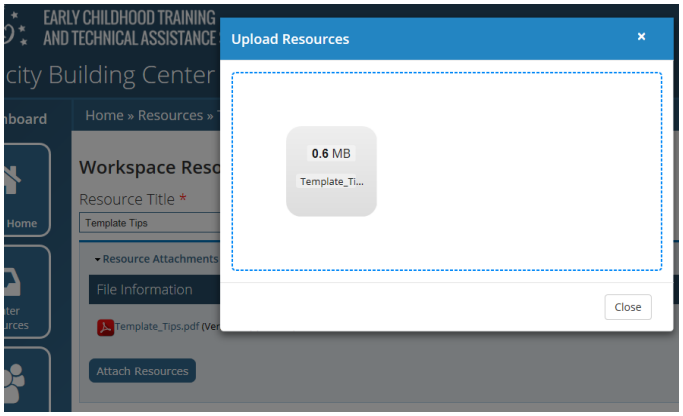
**Step 1.**




**Step 2.**




**Step 3.**



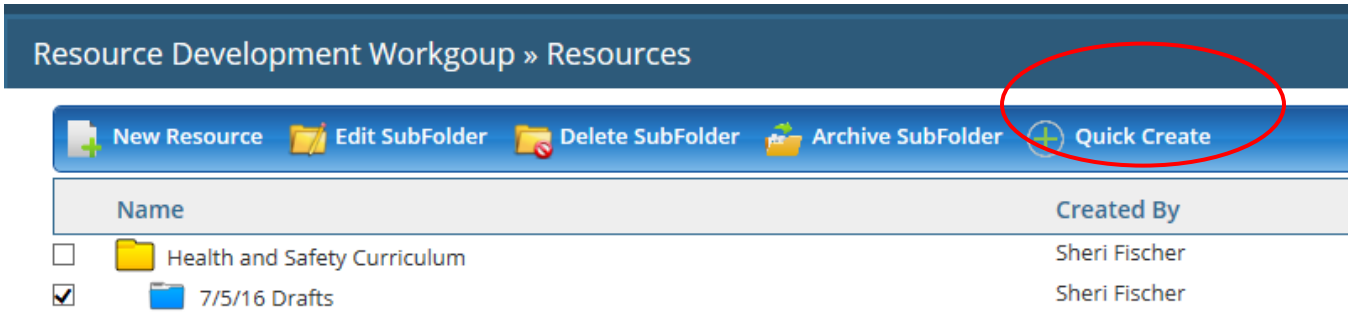

## Method 2: Quick Create

- From the workgroup or center resources page, locate the folder and subfolder where you want to upload a resource.

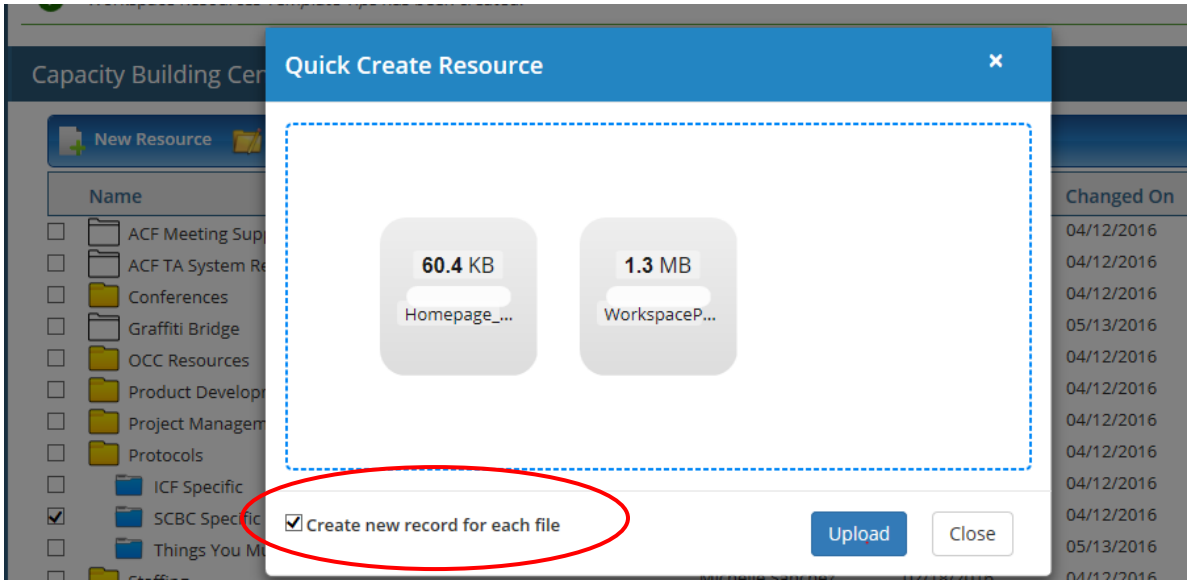
- Select the check box next to the subfolder name. On the menu bar, select "**Quick Create**."
- Add a title in the "Resource Title" field (see "Tips for Creating a Resource Title" section).
- Select "**Attach Resources**." Click inside the upload box to browse for the file or drag and drop the file into the upload box.
- Select "**Upload**." Once the check mark appears over the file, select "**Close**."

**Note: The Quick Upload option skips many of the additional fields when uploading a resource. Users should go back to the record and complete all the fields so that the resource is easier to find when other staff use the search feature.**

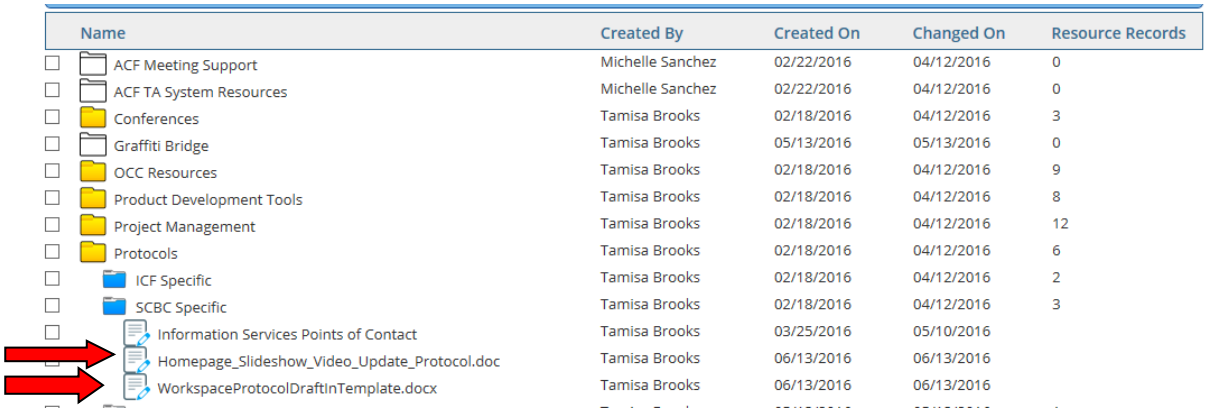
**Step 1.**




**Step 2.**



**Step3.**



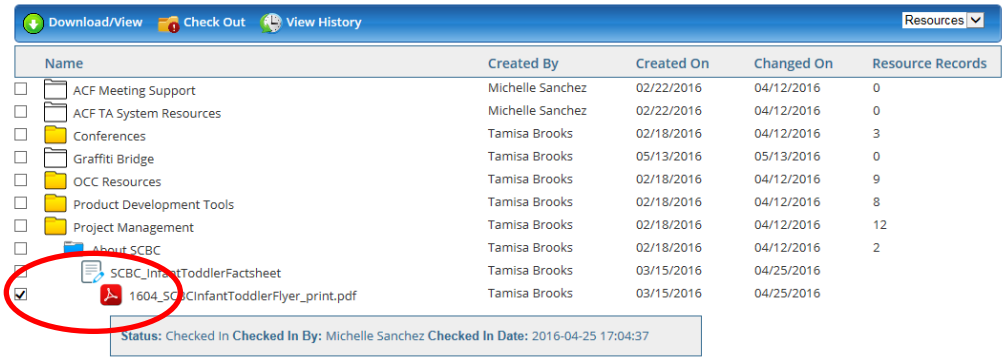

# Tips for Creating a Resource Title

- The resource title is different from the file name. The resource title is the name of the record that contains the resource description, tags (words associated with the resource in order to identify when doing a faceted search, and the document itself.
- Use the actual title of the document name whenever possible (or truncate the title if needed). For example, “Preventing Expulsion and Promoting Social-Emotional Health through Effective Investment of CCDF Quality Funds” could be shortened to “CCDF Preventing Expulsion.” Otherwise, use a descriptive title that follows the naming conventions of other resources in the folder.
- Do not include descriptive text that is already included in the folder structure. For example, protocols are in a folder named “Protocols,” so a document in that folder could be titled “HomePageSlideshow.”
- Do not include the year or date in the title since this information is provided in other fields and will interfere with version control if part of file name.
- Do not include version numbers.
- Do not include periods.

## Viewing Resources (No Edits Required)

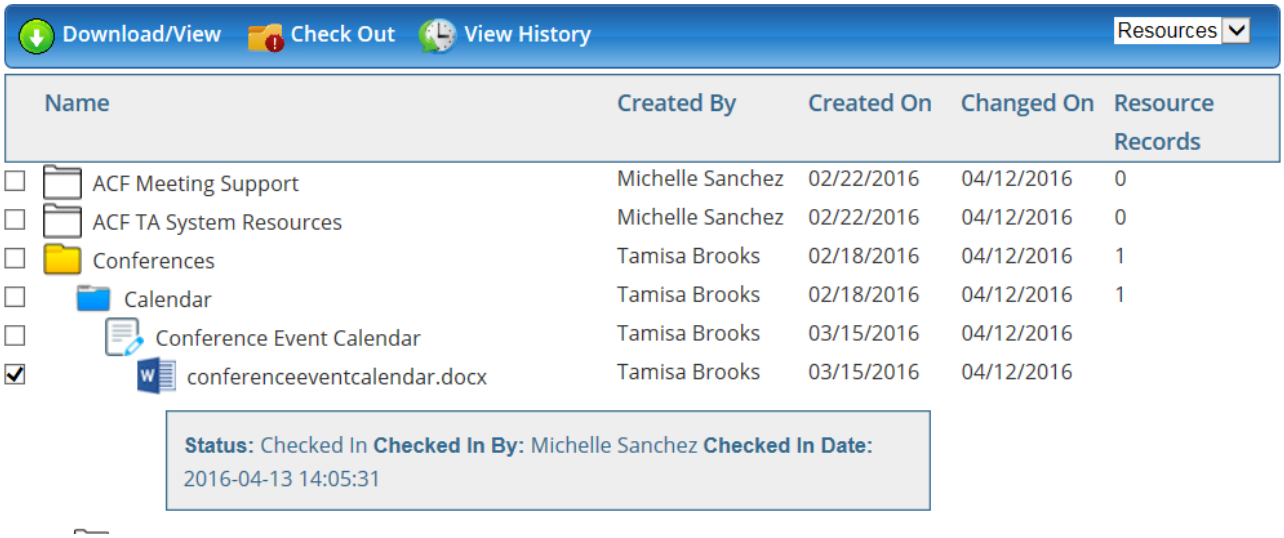
- Expand the accordion file structure to locate the document you wish to view.
- Select the checkbox next to the document, not the resource record (see the screenshot below).
- On the menu bar, select “**Download/View**.”
- Depending on the browser you are using, a pop up might appear and ask if you want to open or save the file. Select “**Open**.”

**Note: By taking these steps, you can view the document but it is not checked out to you and is not saved anywhere. If you make changes to this document, the changes cannot be incorporated into the Workspace version. To make edits, close the document and reopen using the check-out feature (see the next section).**




## Editing Resources (Checking Out)

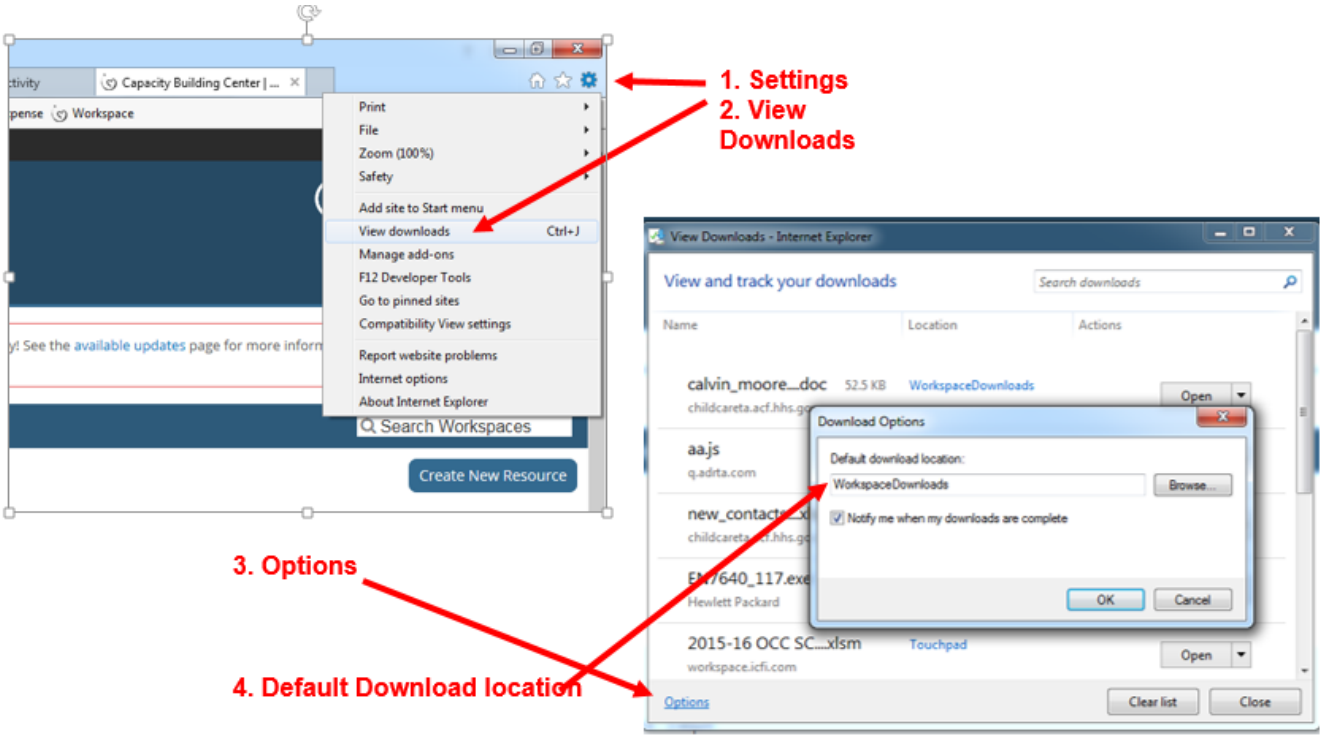
- Expand the accordion file structure to locate the document you wish to view.
- Select the checkbox next to the document (not the resource record).
- On the menu bar select "**Check Out**."
- A pop up will appear to confirm checkout.
- Depending on the browser you are using another pop up might appear and ask if you want to open or save the file. Select "**Save**."
- After you have saved the file, another pop up will ask if you want to open the document or open the folder. You can select either option.




**Note: It is imperative that you select "Save." Otherwise the document will be checked out to you but it will not be saved anywhere. Any changes made to the document will be lost.**

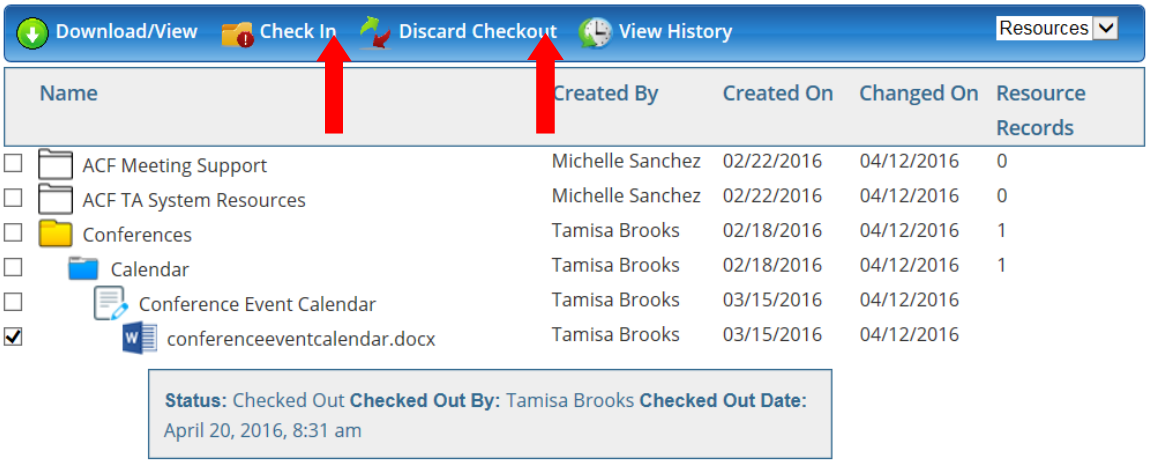
# Where to Locate Downloaded Documents

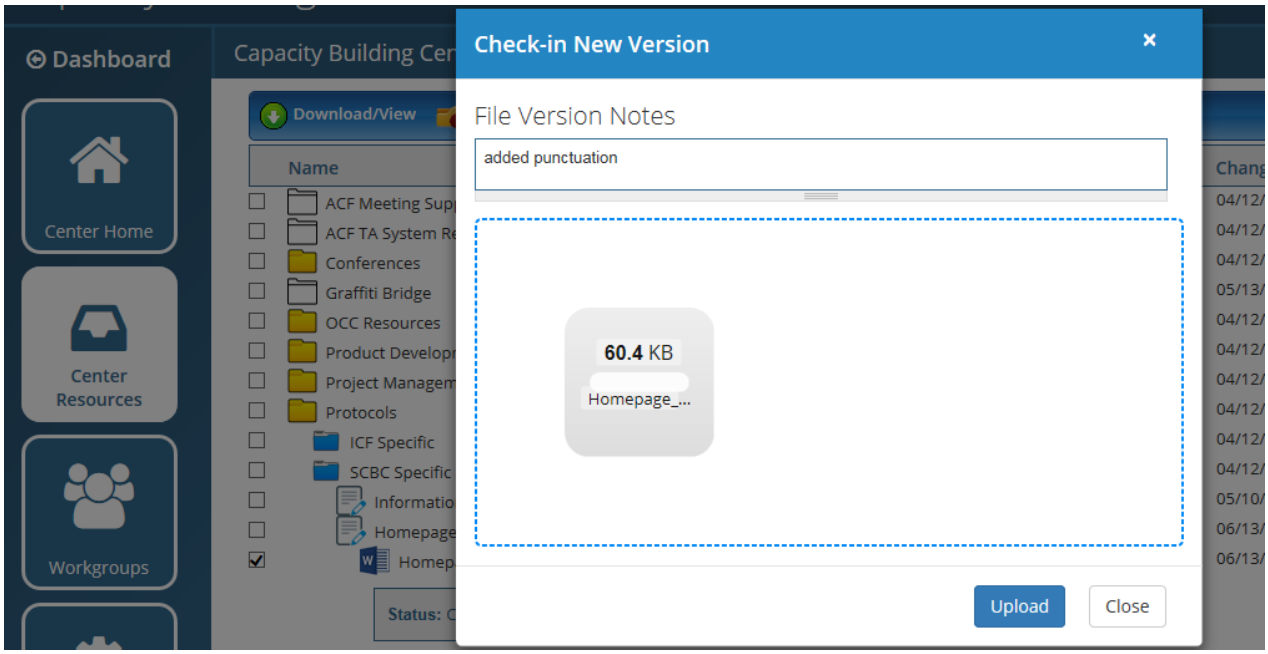
- Any documents checked out from the Workspace will be saved on your computer. In order to check in the document, you will need to be able to locate where the document was saved.
- If you would like to tell your computer where to download documents, follow these steps:
  - Create or locate the folder where you want documents saved.
  - In Internet Explorer go to the browser's "Settings," then "View Downloads," then "Options."
  - In the "Default Downloads" location, select "**Browse**" and select the folder you created.
  - All future downloads will go to that folder.



# Editing Resources (Checking In)

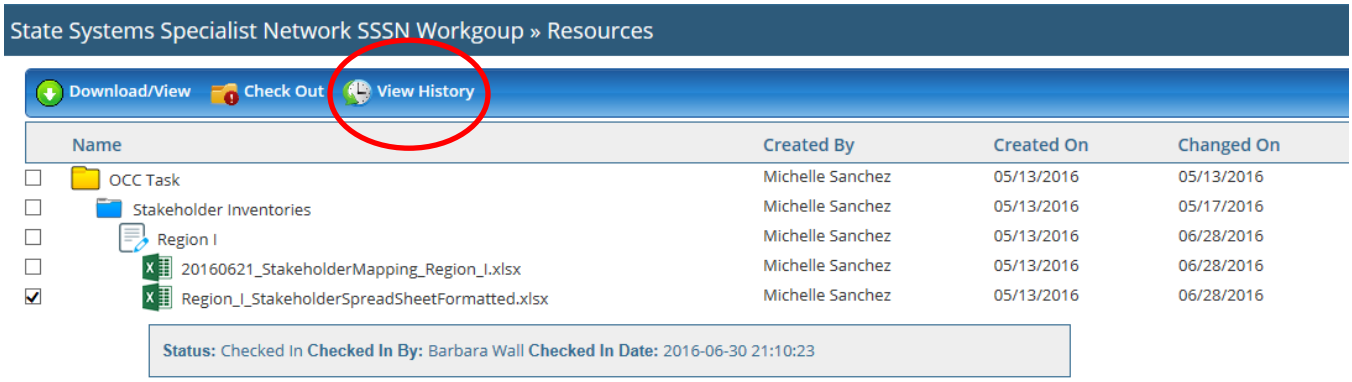
- Expand the accordion file structure to locate the document you wish to check in.
- Select the checkbox next to the document (not the resource record).
- If no changes have been made to the document, you can select "**Discard Check Out**." If changes have been made, select "**Check In.**"
- When editing the document, it must be saved as the same filename as which it downloaded, including the four character extension that the system appends.
- In the "File Version Notes" field of the "Check-in New Version" box, enter any notes pertinent to the revisions that were made. Click inside the upload box to browse for the file, or drag and drop the file into the upload box.
- Select "**Upload**." Once a check mark appears over the file, select "**Close**."

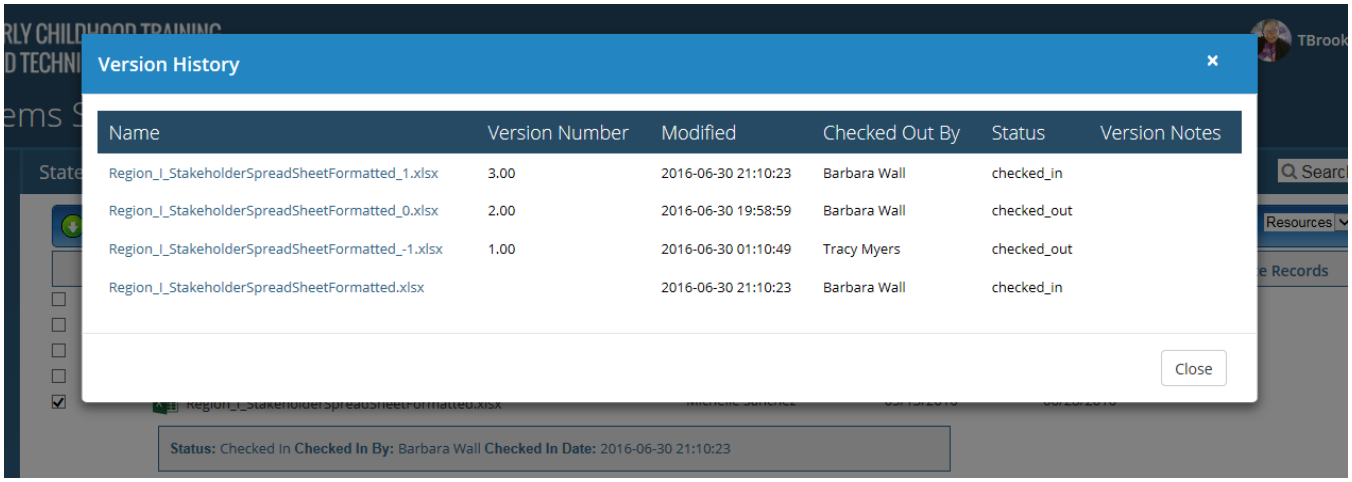





## View Resource History

- Expand the accordion file structure to locate the document for which you wish to view the history.
- Select the checkbox next to the document (not the resource record).
- Select "**View History**."






*For information about using the workspace, contact your workspace moderator. Send requests for technical support to OCCInfoServices@icfi.com with the subject line WORKSPACE.*